

## Meeting Summary Notes

Participants:

Name	Organization	Email
Christopher Freitas	U. S. Dept. of Energy, Fossil Energy	<a href="mailto:christopher.freitas@hq.doe.gov">christopher.freitas@hq.doe.gov</a>
Bud Danenberger	U. S. Dept. of Interior, Minerals Management Services	<a href="mailto:elmer.danenberger@mms.gov">elmer.danenberger@mms.gov</a>
Linda Kelly	National Association of Regulatory Utility Commissioners	<a href="mailto:linda.Kelly@po.state.ct.us">linda.Kelly@po.state.ct.us</a>
Brian Griffin	Southern States Energy Board	<a href="mailto:bcgriffin@cox.net">bcgriffin@cox.net</a>
Carol Handwerker	National Institute of Science and Technology	<a href="mailto:carol.handwerker@nist.gov">carol.handwerker@nist.gov</a>
Paul Beckendorf	Gas Technology Institute	<a href="mailto:paul.beckendorf@gastechnology.com">paul.beckendorf@gastechnology.com</a>
Jeff Wiese	U. S. Dept. of Transportation, Office of Pipeline Safety	<a href="mailto:jeff.wiese@rspa.dot.gov">jeff.wiese@rspa.dot.gov</a>
James Merritt	U. S. Dept. of Transportation, Office of Pipeline Safety	<a href="mailto:james.merritt@rspa.dot.gov">james.merritt@rspa.dot.gov</a>
George Tenley	Pipeline Research Council International, Inc.	<a href="mailto:gtenley@prci.org">gtenley@prci.org</a>
Cliff Johnson	NACE, International	<a href="mailto:cliff.Johnson@mail.nace.org">cliff.Johnson@mail.nace.org</a>
Raymond Paul	Association of Oil Pipelines	<a href="mailto:rpaul@aopl.org">rpaul@aopl.org</a>
Charles Jewell	Valero/Association of Oil Pipelines	<a href="mailto:charles.jewell@valero.com">charles.jewell@valero.com</a>
Marty Matheson	American Petroleum Institute	<a href="mailto:matheson@api.org">matheson@api.org</a>
Terry Boss	Interstate Natural Gas Association of America	<a href="mailto:tboss@ingaa.org">tboss@ingaa.org</a>
Lori Traweek	American Gas Association	<a href="mailto:ltraweek@aga.org">ltraweek@aga.org</a>
Ted Williams	American Gas Association	<a href="mailto:twilliams@aga.org">twilliams@aga.org</a>
Paul Wood	Cycla Corporation	<a href="mailto:paulw@cycla.com">paulw@cycla.com</a>
Herb Wilhite	Cycla Corporation	<a href="mailto:herbw@cycla.com">herbw@cycla.com</a>

### Meeting Purpose

This meeting of the OPS-convened R&D Blue Ribbon Panel was held for several purposes, including:

- To thank the Panel members for their past efforts to improve the success of the program,
- To update the panel on the R&D Program,
- To seek comments from the Panel on evolving R&D priorities and candidate performance measures.

OPS presented its R&D efforts to-date and current R&D priorities for discussion. It also presented a list of candidate performance metrics for the R&D program. Slides presented by Jeff Wiese and Jim Merritt at the meeting are available on the OPS R&D Web Site <http://primis.rspa.dot.gov/rd>.

### R&D Program To-Date

OPS discussed the Memorandum of Understanding (MOU) being drafted among the Departments of Transportation (Office of Pipeline Safety), Energy, and Interior (Minerals Management Services). The purpose of this MOU is to clarify areas of focus in federally-funded Pipeline R&D Programs. The

## Meeting Summary Notes

responsibilities and areas of expertise for each participating agency were discussed, as described in the draft MOU and in the Pipeline Safety Improvement Act (PSIA) of 2002.

### Questions Asked:

- When OPS talks about a 3-5 year window for R&D technology to be made available in the marketplace, when does the calendar start – at the time of the project award or when the technology resulting from the R&D project is demonstrated? (OPS: The 3 to 5 year time frame is intended to designate a near-term focus for the R&D projects. It represents an approximate time frame on which results are expected to be developed and made available for application within the industry.)
- What is meant by “co-funded”? Is 50% cost sharing required, or could it be less? (OPS: The Broad Agency Announcements (BAA's) don't explicitly require a 50% cost sharing, but OPS has made clear in communications to prospective vendors that projects should be proposed at a 50% cost-sharing. However, OPS tries to respect the selection team's recommendations.)
- Since some sources of gas pipeline industry funds may be drying up over the next two years, how will co-funding at the 50% level continue to be realistic? Can agencies co-fund each other? (OPS: In the future, consideration may be given to co-funding through “in kind” resources. Theoretically agencies may be able to co-fund each other, but the short-term focus of OPS and the long-term focus of DOE may make that course impractical.)
- Is it clear that OPS has the lead on where resources are to be spent on pipeline security R&D? (OPS: The MOU under development is attempting to clarify areas of focus for federally-funded R&D programs, and the Pipeline Safety Improvement Act of 2002 has shown the general intent of Congress.)
- Is “improving technology for pipeline incident and accident analysis” an R&D priority or an OPS internal priority? Panel members expressed the thought that this may not be an R&D issue, but rather an internal process issue that needs to be addressed within OPS and the industry. (OPS: This is a priority in the mapping/data integration arena (budget) but not specifically in R&D. See additional comment, below.)

### Comments/Suggestions:

- OPS should explore how industry can work in coordination with the participating agencies to streamline the administration of the R&D efforts. (OPS: We are focused on collaborative efforts, but will probably never get to the point of sharing dollar resources among agencies for common program administration.)
- OPS should show the co-funded amount, not just the OPS amount, on presentation slides relating to project funding. (OPS agreed this is a good idea.)
- OPS should separate “damage prevention” from “leak detection” as a project focus area since one is designed to prevent incidents and accidents while the other is intended to identify the presence of loss of pipeline integrity.
- Better articulation is needed of the process of moving R&D technologies into standards and, subsequently, into regulations. A more methodical and logical process is needed. Perhaps the relationship between R&D projects and either existing or developing standards or rules should be included as a funding consideration.
- Regarding research focused on data integration and mapping, pipeline incident/accident data fields need to be universally defined, possibly by a Standard.
- There is a large area of ambiguity in the overall security R&D coordination (e.g., Office of Energy Assurance, OPS and the TSA).
- OPS should extend its collaborative efforts in the pipeline security R&D area.

## Meeting Summary Notes

- OPS should spend some time differentiating between “hard” and “soft” science; “improving technology for pipeline incident and accident analysis” is not indicative of “hard” R&D efforts.

### Actions:

- Once the MOU has been finalized, OPS will produce a Venn diagram illustrating the participating agencies’ areas of responsibilities and the overlap among those.
- OPS will hold a joint meeting of the technical advisory committees (target end of July 2003) to review a draft version of the five year R&D plan.

### **R&D Priorities**

OPS presented and asked the group to comment on the focus of priorities in going forward with future solicitations/proposals. The current focus evolved from inputs received from previous workshops (federal and industry, expert-review panels, industry presentations and discussion, the Pipeline Safety Improvement Act of 2002, and the draft MOU between OPS, DOE and MMS. It includes a broad range of priority areas related to pipeline safety R&D.

### Questions Asked:

- Can OPS map compliance requirements from PSIA '02 into current R&D projects; what are the gaps where R&D is not addressing those requirements? Examples of areas required by PSIA 2002 in which R&D projects are already being funded include direct assessment and long-seam welds.
- Are the priorities presented at the meeting ranked? (OPS: no effort was made to rank the priorities shown. These priorities represent an initial attempt to define areas in which future solicitations will be made. Further work in finalizing the priorities will consider the input from the Blue Ribbon Panel.)
- In some material presented on priorities the Panel questioned whether the user of the R&D would be industry, the regulatory community or both. Examples include: “mapping” and “data integration”. Is “security” for OPS or operator? OPS should clearly articulate what these areas mean.

### Comments/Suggestions:

- There is an issue on integrity management regarding calendar/scheduling of when segments can be taken down for testing/maintenance. For example, the Northeast Regional Model has been used to characterize supply impacts of line outages related to integrity management. IM decisions on waivers should include consideration of supply issues. OPS should interact with DOE on this topic.
- Industry participants on the Panel expressed similar concerns regarding the 7-year re-inspection timeline and whether there is adequate knowledge of the factors that could lead to a serious supply impact. Is this a topic for R&D?
- For the winter 2003/2004 workshop planned by OPS, consideration should be given to integration with the PRCI workshop planned for mid-January 2004. Also, consideration should be given to broadcasting and/or web-casting these meetings to reduce the travel burden. (OPS: workshops are to showcase R&D technologies, federal and other. Better meeting integration and more efficient means to involve industry participation will be considered.)

## Meeting Summary Notes

- Scheduling relates to the issue of collaboration. OPS should work within the context of industry forums to reach field people that will apply the technologies. (OPS/DOE: Yes, but not to the exclusion of federally-sponsored R&D workshops that work to draw R&D contractors together.)
- Operators need help in determining which technology to choose to apply. This concern relates to promoting the deployment of new technology by clarifying the role of the technology in addressing regulatory requirements.
- Need to define the audience and purpose for each meeting/workshop. (OPS: Agree. We need to define the purpose, audience, communication needs of the audience, the approach and methods.)
- AGA (Traweek) volunteers to take the first cut at identifying planned meetings (relative to upcoming industry workshops) and what's needed, and share with the panel for input.
- DOE: We should write into the vendors' contracts that they must support demonstration events.

### Actions:

- OPS will draft a model for communication of developed technologies for review by the panel. (e.g., Government R&D → Standards Organizations → Regulatory Rulemaking → industry community and end users)
- OPS will update the priorities to reflect comments from the Panel and forward the updated listing.

### Performance Metrics

OPS presented and discussed a candidate set of performance metrics for the R&D program. These metrics are currently being finalized, so comments from the Panel are timely. OPS also noted that in its updating and restructuring of the set of performance measures it will more clearly display their relationship to the strategic objectives of the R&D Program, and to the top-level goals of RSPA.

### Questions:

- Is there a mechanism to stop a project mid-way (e.g., if it is determined to be not cost-effective or effective in resolving the underlying problem)? If so, what are the metrics useful in supporting project termination decisions? Documenting failures is important.

### Comments/Suggestions:

- OPS should consider developing and using list servers on specific topical areas to push information to those that indicate an interest in receiving such info. The list servers should be maintained with current E-mail addresses. OPS should offer broad categories and specific sub-categories of topics for users to express their interest in.
- R&D projects should be categorized based on standards/regulations and topical areas to allow end users to distinguish the applicability of the projects. This could be tied to the regulatory process to alert end users when they should be concerned.
- A draft description of the relationship between R&D projects and the basis on which they are selected, with consideration to their role in filling gaps in technologies used to satisfy provisions in standards and regulations would be helpful to the technical advisory committees also.
- Performance metrics should include a review of each project by the end users.
- Divide metrics into two parts: 1) process metrics for the R&D program, and 2) metrics for the performance of a specific technology.
- DOE: GAO performance metrics are different than, for example, OMB's.
- Evolution of a technology into a standard should be a large measure of success.

## Meeting Summary Notes

- Need underlying performance metrics depicting trends in accidents/incidents normalized to the volume of product moved during the time interval.
- Measures should be identified to support decisions on whether the seven-year reassessment interval is too restrictive or too long.

### Actions:

- OPS will include a session on "Communication Challenges" in the next workshop. (DOE offered an example in its "Tech Lines" newsletter.)
- OPS will refine and package the listing of performance measures for review by the Panel. The review should include (a) the structure of the measures, (b) the appropriateness of the ranking, and (c) omissions or undesirable measures in the list.
- OPS will consider how to achieve broader collaboration on how best to get new technologies into use in the field.

### Wrap Up

#### Comments/Suggestions:

- It would help to schedule meetings and to share meeting forums if a standard R&D planning calendar was visible and shared. Such a calendar would also help suppliers understand the time frames on which proposals on subjects of interest to them will be required.
- It would also help to list the various needs of the program relative to GAO, Congress, etc.
- It is important to keep this (Blue Ribbon Panel) dialog going.

#### Actions:

- OPS will summarize the meeting and provide a summary and feedback to all participants.
- OPS will likely ask for a sub-group to work on performance metrics.
- OPS will draft a calendar and get input from others.
- OPS will consider a follow-up meeting, perhaps using web-conferencing.

### Adjourn